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Peculiarities and Tendencies of Hotel Services Market Development in Uzbekistan

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Annotation.

The hotel business is an essential element of the tourism industry. The formation and development of the hotel industry at the regional level contributes to the creation of new jobs, attracting investment, and creating the image of the region. The paper analyzes the hotel services market of the Republic of Uzbekistan, as well as identifies modern trends in the development of the hotel business in the world and defines prospects.

Keywords: *hotels and similar accommodation facilities, individual accommodation facilities, hotel services market, trends, hostel, hotel houses.*

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INTRODUCTION.

Since the beginning of the 19th century, tourism has been progressively developing, turning into a system-forming branch of the world economy. According to the World Tourism Organization (UNWTO), the tourism industry today forms about 11% of the world's gross domestic product. Simultaneously with the growth of tourist flows, the hotel services market has steadily grown and developed, which is rightly considered the main component of the tourist infrastructure. Over time, competition between hotel enterprises has intensified, which forced hotels to increase work efficiency, introduce new technologies and innovation methods, improve the level of customer service, and improve the skills of employees of the enterprise, including through diversification. But a very painful blow to the tourism industry was dealt by the coronovirus pandemic. Restrictions introduced around the world aimed at curbing the spread of the coronovirus infection first reduced the occupancy of hotels throughout Uzbekistan, and then completely paralyzed the industry. In Uzbekistan, hotel occupancy in 2020 fell by 80-90%. Current tours have been interrupted, those scheduled for a later date have been canceled or rescheduled. The number of local trips has decreased due to restrictions and fears of infection. Losses were counted by hotels of all classes.

But the diversification of hotel services in the difficult conditions of the coronovirus pandemic gave hope for maintaining the efficiency of hotels. The strategy of hotel enterprises in the new conditions was different. Having reformatted the work, each hotel chose its own plan of action, which ensured its viability and its further development.

The purpose of this study is to study current trends in the development of the hotel services market in Uzbekistan, as well as the prerequisites for its further development, based on modern trends in the global hotel services market.

Literature view

Research in the field of economics of the hotel business is reflected in the works of foreign scientists, such as E.I. Bykova, Yu.F. Volkova, E.V. Egorova, E.N. Zhiltsova, N.P. Kurakina, A.L. Lesnik, A.V. Chernyshev, P.P. Chuvatkin. Questions of marketing and management in the hotel business, features of the technology of hotel services, macro- and microeconomic and theoretical organizational aspects, as well as a number of methodological problems of forecasting, studying the demand for hotel services are considered in the works of: V.V. Bogaldin-Malykh, N.A. Voskolovich, V.G. Gulyaeva, E.A. Dzhandzhugazova, N.I. Kabushkina, S.V. Kalashnikov, S.I. Baylik, R. Brymer, G.D. Brashnov, S.A. Bystrov, Yu.F. Volkov, T.T. Doroshenko, A.P. Durovich, A.P. Kosolapov, A. S.Kuskova, J.Makenza, G.A. Papiryan, Render G., Sorokina A.V., Walker J., Filippovsky E.E., Khaxever K., Chernikova L.I., Chudnovsky A.D. and others. In addition, theoretical studies were analyzed on the functioning of enterprises in the hospitality industry by such authors as Ivanov V.V., Kotler F., Laiko M.Yu., Lesnik A.L., Lifits I.M., Rozanova T. .P., Skobkin S.S., Sulpovar L.B., Walker J.R., Chernyshev A.V. and etc.

Separate tasks of the development of the tourism and hotel industry in the conditions of Uzbekistan are reflected in the scientific works of a number of scientists-economists, such as K.Kh. Abdurakhmonov, E.V. Golysheva, N.S. Saidov, B.Sh.Safarov, T.Tashmuratov, N.Tukhliev, I.S.Tukhliev, B.Kh.Turaev, D.K.Usmanova, O.Kh.Khamidov, M.T.Alimova, A.N. Kholikulov and

others.

Methodology

The research uses the methods of scientific abstraction, analysis and synthesis, induction and deduction. Analysis is the mental division of an object or phenomenon into its constituent parts, i.e., the allocation of individual parts, features and properties in them. Synthesis is a mental combination of individual elements, parts and features into a single whole. Induction is a way of reasoning and a research method in which a general conclusion is built on the basis of particular premises. Deduction is a method of reasoning by means of which a particular conclusion necessarily follows from general premises. Analysis and synthesis (also induction and deduction) are inextricably linked, are in unity with each other in the process of cognition. Analysis and synthesis, induction and deduction only in their unity provide a complete and comprehensive knowledge of reality.

Results

Hotel service is a combination of all accommodation facilities located on the territory of various levels, providing a different level of service and quality of services (hotels, motels, campsites, boarding houses, private apartments and houses, tourist camps, holiday homes and other accommodation facilities). Tourist flows directly depend on the level of their development and the quality of services provided.

The modern hotel business in Uzbekistan is represented by several types of institutions: hotels and similar accommodation facilities (hotel, motel, hotel-type boarding house, other places of short-term accommodation); individual accommodation facilities (guest house, dacha, yurt camp, other types of individual accommodation facilities); other accommodation facilities (hostels, hostels).

The hotel complex of the Republic of Uzbekistan is represented by 1013 hotels with a total number of 50112 rooms (1-table). In 2020, the rate of availability of places in hotels per 1,000 residents in Uzbekistan amounted to 1.5 places. It should be noted that according to WTO statistics, there are 40 hotel beds per 1000 people in the United States, 30 in Switzerland, while the average annual occupancy rate of hotel beds in Europe and America is 70% or more.

1-table

Indicators of the development of the hotel services market in Uzbekistan (2020)

Indicators	**Number of accommodation facilities, units**	**Number of seats, units**	**Number of accommodated persons,**	**Including of citizens Uzbekistan**	**Number of overnight stays, units**	**Including of citizens Uzbekistan**
Hotels and similar accommodation	**1109**	**50112**	**702788**	**560305**	**1758779**	**1340496**
Hotel	973	46314	690658	549736	1709995	1300893
Motel	20	482	1113	401	2356	522
Boarding house (hotel type)	9	690	1279	1115	6882	6656
Other short term	107	2626	9738	9053	39546	32425

accommodations						
Individual accommodation facilities	**185**	**3416**	**14238**	**10802**	**30944**	**18251**
Guest House	156	2366	12571	9519	25392	13926
Dacha	8	116	657	657	1181	1181
Yurt camp	6	348	149	117	153	119
Other types of individual accommodation facilities	15	586	861	509	4218	3025
Other accommodation facilities	**92**	**6110**	**46681**	**43873**	**444116**	**334127**
Hostels (youth hotels)	72	2853	37500	35379	117790	107918
Dormitories	20	3257	9181	8494	326326	226209

In 2016-2019, large-scale reforms in the field of tourism were carried out in Uzbekistan. In order to further improve the efficiency of using the tourism potential of the regions of the republic, ensure the dynamic development of modern tourism infrastructure in the regions, expand and improve the quality of hotel services, attract a wide range of investments in the hotel industry, as well as eliminate shortcomings in accommodation facilities, a resolution of the Cabinet of Ministers of the Republic of Uzbekistan dated 24 November 2018 No. 954 "On additional measures for the accelerated development of the hotel business in the Republic of Uzbekistan". During 2018, the requirements for the operation of hostels were simplified with the abolition of 22 requirements (the presence of a separate entrance, an illuminated or luminous sign, signs or signs with the names of premises and rooms / rooms, a container with a minimum supply of water, an elevator in a building of more than five floors, doors and locks with an internal safety or latch, luggage storage rooms, service areas, smoking areas, the need for a certain area for each visitor), as well as the need for training of hostel employees. These simplifications were established by amending the state standard O'z DSt 3220. In addition to the above, changes have also been made to the standard, according to which hostels are allowed to use only artificial lighting in residential, public premises, in corridors and on stairs; for hostels with up to 30 beds, it is allowed to use one bath / shower and a shared toilet; simplified requirements for equipping rooms with furniture and equipment (the presence of a double bed, bedspreads on the bed).

The possibility of accommodating foreign tourists in private apartments was created by amending the current legislation.

In order to create new jobs for the local population, develop ecological and rural tourism in the country, and expand the types of services provided to tourists, a simplified procedure for organizing family guest houses was adopted in August. Thus, the requirement for certification was abolished and minimum requirements for the creation of guest houses were established. In addition, a preferential

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mechanism for allocating loans has been introduced, when 50% of the interest rate of the loan is covered by the Tourism Support Fund. As a result, over the past period, more than 156 new guest houses began their activities.

Favorable institutional conditions ensured an increase in the number of hotels and similar accommodation facilities in 2015-2019 by 64.7 percent (Table 2).

2-table

Dynamics of development of the market of hotel services in Uzbekistan

indicators		2015	2019	2019/ 2015, %	2020	2020/ 2019, %
hotels and similar accommodation facilities number, units	quantity, units	615	1013	164,7	1109	109,5
	bed fund (number of beds, units)	34898	46671	133,7	50112	107,4
	number of accommodated persons, people	1325240	2193394	165,5	702788	32,0
	including citizens of Uzbekistan	900595	1099163	122	560305	51,0
	total number of overnight stays, persons	3324754	4838910	145,5	1758779	36,3
	including citizens of Uzbekistan, people	2277513	2482259	109	1340496	54,0

According to the State Committee for Tourism Development, the main capacity of accommodation facilities nationwide is in four regions: Tashkent (35%); Samarkand (11%); Bukhara (13%); Khorezm (8%) regions (Figure 1).

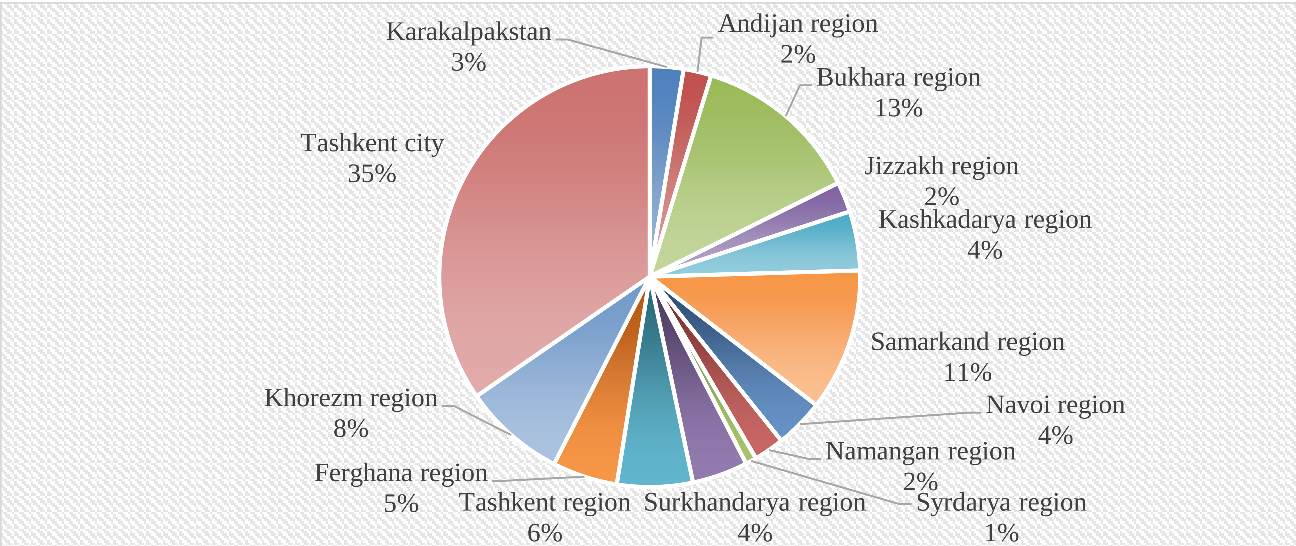


Figure 1. Territorial distribution of accommodation capacity of hotels operating in the country

50.2% of users of hotel services in the Republic of Uzbekistan are citizens of the Republic of

Uzbekistan. One of the important factors that have had a positive impact on the growth of domestic tourist flow is the establishment of hostel accommodation facilities in the regions of the country.

The resolution of the Cabinet of Ministers of the Republic of Uzbekistan dated 2018 Resolution No. 954 "On additional measures for the accelerated development of the hotel business in the Republic of Uzbekistan" created conditions for significant development of the hotel industry in our country. According to the resolution, the State Committee for Tourism Development of the Republic of Uzbekistan and the Ministry of Construction of the Republic of Uzbekistan will build small hotels and hostels with a capacity of 8-50, designed on the basis of standard projects, taking into account the positive foreign experience of design, including Turkey and Korea.

In accordance with the Regulation "On measures to create favorable conditions for further development of the hotel business" annexed to this Resolution, a business entity that has built a new hotel and other accommodation facilities and commissioned them from January 5, 2019 to January 1, 2022 In order to cover part of the costs of construction and equipping this hotel, the order of allocation of funds from the State Budget of the Republic of Uzbekistan, as well as partial financing of businesses that are residents of the Republic of Uzbekistan, signed a franchise agreement on January 5, 2019.

Today, there are 214 hostels in the country with a capacity of 2,238 rooms and 6,931 seats. The fact that the main capacity of hostels is located in Tashkent (52%), Bukhara (12%), Samarkand (9%), Navoi (7%), Tashkent (11%) regions does not create sufficient conditions for the formation of new tourist destinations. caused by falling into the regions (Fig. 3).

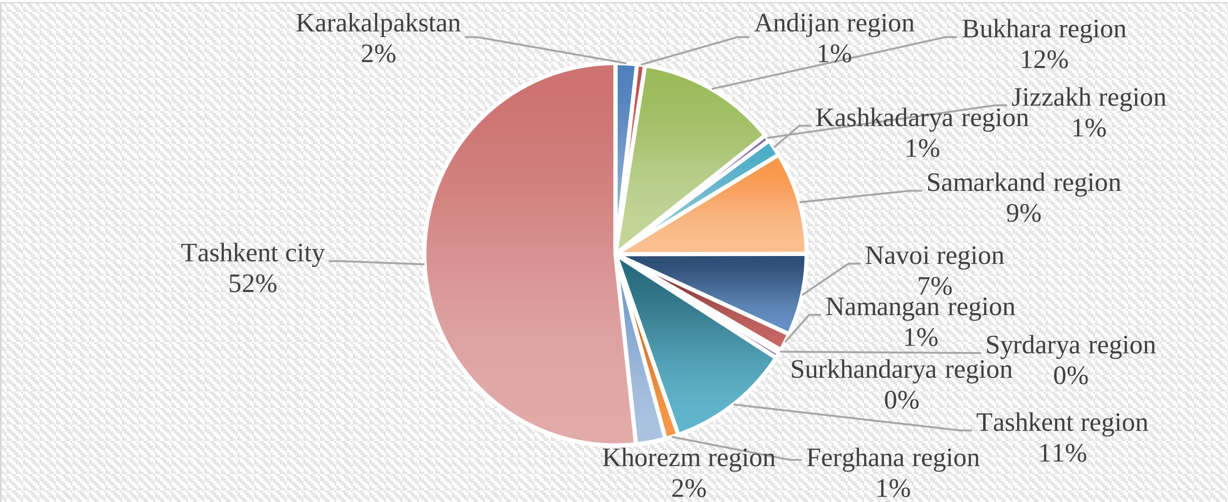


Figure 2. Regional distribution of accommodation capacity in hostels operating in our country

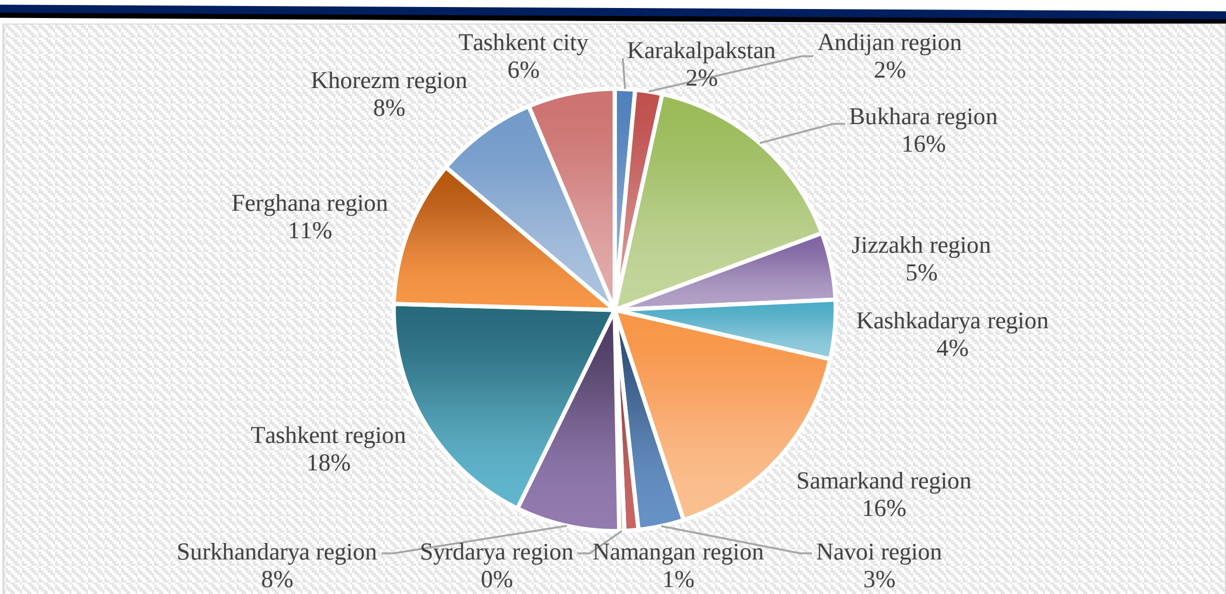


Figure 3. Regional distribution of accommodation capacity in guest houses operating in our country

The formation of accommodation infrastructure in the country was an effective solution to such issues as unequal distribution of accommodation facilities across the country (as of January 1, 2020, there were 886 family guest houses with 7503 beds in the country), and as a result reduced the differentiation of tourist products (4 -picture).

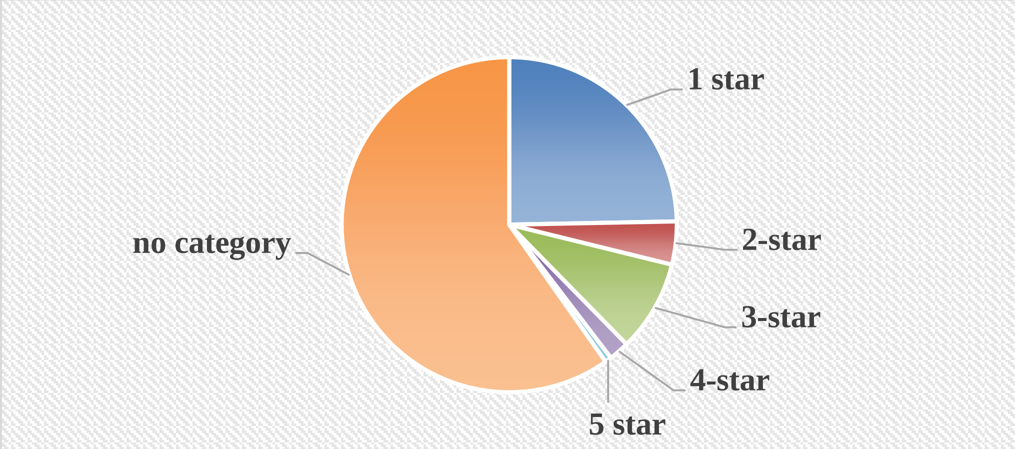
In order to support the development of tourism, increase the efficiency of tourism potential of the regions, improve the conditions for recreation and tourism, as well as create new jobs in the field of tourism services and increase employment and welfare of the population. Resolution No. 631 of August 1 "On the organization of the activities of family guest houses." According to him, family guest houses provide temporary accommodation and (or) catering services to up to 10 visitors (tourists) at the same time on the principle of living in these guest houses with family members of the host, as well as 3 m2 per resident. private housing with living space; family guest house services will be provided by private entrepreneurs or family business entities that have and live in a residential building suitable for the organization of a family guest house.

Confirmation of the level of quality of hotel services, an indicator of the class and level of service of the hotel is the assigned category. Currently, there is no mechanism for the mandatory classification of hotels that needs to be introduced. In this regard, in Uzbekistan, the categories of hotels are distributed as follows: 5 star - 6 units or 1%; 4 stars - 19 units or 2%; 3 stars - 85 units or 9%; 2– 40 units or 4%; 1 star 238 units or 24%; without categories - 576 or 59%.

The classification system of hotels and other accommodation facilities contributes to:

- observance of modern service standards and improvement of the quality of services provided in hotels and other accommodation facilities;
- harmonization of the requirements of Russian and foreign practices of the hotel business;
- differentiation of hotels and hotels allows the tourist to decide on the range and quality of services provided.

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4-fig. Distribution of hotels in Uzbekistan by category (2020)

Thus, the introduction of a mandatory classification system for accommodation facilities will be an important step towards improving the quality of hotel service.

Speaking about the main directions of development of the hotel sector, it should be noted that world experience shows the effectiveness of investments in hotel chains, and not in individual hotel facilities. In world practice, there are two main types of hotel chains: integrated chains, which are created from homogeneous units, and a hotel consortium, which brings together independent hotels. Attracting integrated and franchising hotel chains to the regional market will increase the level of development of the hotel sector. Moreover, in our opinion, it is advisable to develop one, two, and three-star hotel chains - especially since such experience is quite common and effective in world practice (for example, in France, the franchising system is developing in the one- and two-star hotel sector).

The problem of categorization of accommodation facilities is one of the most important in terms of quality management. The "stars" of accommodation facilities are an important source of information for the consumer. When a hotel is classified and has officially assigned "stars", then the level of service in it is appropriate. Such an assessment of hotel complexes, of course, is objective. At the same time, it is almost impossible to position the level of accommodation facilities that have not passed the classification. Owners and tourists often give different assessments of the same complex.

Modern trends in the development of hotel services in the world, which are significant factors in the development of the hotel services market in Uzbekistan:

1. Digitization. The trend towards digital and contactless services gained new momentum in 2020. Customer-facing services are being reformed based on new technical capabilities: mobile check-in, contactless payments, voice control, biometrics.

2. Personalization, targeting a certain type of guests. Consumers unlocking their smartphones and laptops with facial and fingerprint recognition expect the same convenience when accessing their hotel rooms. Personalized rooms with smart technologies: "smart" carpets, talking mirrors, beds, virtual reality helmets, etc. - these are their needs for modern hotel services.

3. Solo travelers. Today it has become characteristic for travelers to desire to spend time alone. In order to increase the comfort of single guests, hotels are trying to reduce the barriers between hotel staff and guests by creating an informal atmosphere, choosing an interior design close to home comfort.

4. Virtual reality. If time-limited travelers can avoid communication, others will only welcome it even in a virtual form. People accustomed to digital assistants and chatbots are interested in virtual companions who can entertain, educate and make friends (smart mirrors). Today, hotel digital assistants can support check-in, provide useful leisure information, and connect guests with family and friends in a couple of clicks.

5. Automation and technology technology allows: keyless entry to the room, mirror TV, smart mirrors, SMS concierge, smart thermostats, video and audio streaming, smart lighting, docking stations, high-speed Internet, photosensitive sensors, robots - receptionists , concierges, butlers, messengers, vacuum cleaners, etc.

The problems that cause them at the present time are usually distinguished by the following:

1. Shortage of qualified personnel. Indeed, for a number of reasons (compared to other industries, relatively low wages; irregular work schedule both throughout the year due to the seasonality of the occupancy of accommodation facilities, and during the week due to the need to work at night, on holidays, etc.) the need for constant improvement of knowledge in order to meet the rapidly changing technical equipment of hotels, means of communication, etc.), highly qualified personnel do not tend to work in a hotel. However, as Dorin notes, “The main feature of labor in the tourism sector is its unskilled nature. Mechanization and automation have little effect on this service sector; as before, the production process is based on manual labor and direct contact between service personnel and customers. 80% of those employed in tourism are unskilled labor.”

2. Technological innovation. Surveys of hospitality executives conducted between 2011 and 2019 showed that 72% of them invest in technological innovation. Among such innovations, for example: equipment for creating the necessary microclimate for the visitor himself, innovative furniture that meets the needs of the visitor, the possibility of transforming the room, changing the position of walls, furniture, etc.

3. Changing the nature of the consumer of hotel services, his stereotype, motivation, behavior, requests. The emerging modern consumer is a highly developed traveler, familiar with high technology and expecting an appropriate level of hotel service. An employee of a hotel company is in constant communication with consumers of various psychological types (according to K. Jung, there are four main types of customers: thinking, feeling, deciding and perceiving).

4. Increasing the personal aspect in the requirements for the quality of services. Today's visitor expects an exclusive attitude towards him and, entering the room provided to him, he wants comfort, the requirements for which are different for each visitor.

Conclusion

Thus, the creation of a modern tourism industry is impossible without hospitality enterprises, which occupy an important place in this field of activity.

Modern trends in the hotel industry involve the individualization of the services provided, anticipating the desires of the consumer with the provision of comfort, both solitude in nature, loneliness, meditation, creating pleasant dreams, and noisy festivals, conferences, holidays, virtual knowledge, communication conditions with the exclusion of worries about payments, about transport, food, etc., since everything should be provided and prepared by the organizers of services based on modern smart technologies. Taking into account current development trends in the hotel services market, they will

ensure the viability of their hotel in a tough competitive environment.

In the near future, the most popular hotels in Uzbekistan will be standard and comfort class hotels, designed for guests with an average income level, as well as the following types of accommodation facilities: hotels-boarding houses; hotels with medical services; hotels with conference rooms; apart-hotels; hostels..

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